

Kinleigh Folkard & Hayward

# Pillars of the community

London's 20-minute neighbourhoods

Autumn/Winter 2021

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## Pillars of the community

Local neighbourhoods are being scrutinised by home movers more than ever. What does Outer London offer buyers looking for amenity-rich and walkable communities?

Our research highlights the most walkable neighbourhoods in Outer London. This independent analysis evaluated and ranked 470 Outer London neighbourhoods\*. For each, we assessed amenities considered by planners to be an integral part of a 20-minute walkable neighbourhood.

\*Based on 2019 Census

**Where are the most walkable neighbourhoods in Outer London?\***

Area, with no. of walkable neighbourhoods	Top boroughs by area, with no. of walkable neighbourhoods
<b>West</b> 15	<b>Easting</b> 6
<b>East</b> 12	<b>Newham</b> 8
<b>South</b> 11	<b>Richmond</b> 3
<b>North</b> 9	<b>Haringey</b> 6

Source: Savills, OLS, OLS, Land Registry  
\*Top 10 based on ranking.

The quality and convenience of our local neighbourhoods took centre stage during the pandemic. Now, with OLP2s shifting attention to the environment, the focus on sustainable, walkable communities is likely to intensify. Home movers, who are currently living with a lasting legacy of home / hybrid working, will also be scrutinising potential neighbourhoods in a different way.

The 20-minute neighbourhood is an urban development concept based on the idea that amenities and services could be reached within a 20-minute walk. It has risen quickly in the minds of policymakers and the public worldwide.

Using the 2019 Census, this model score ranked the number of amenities by category, with a 1, 10, 15, 16, 18 and 20-minute walk, was calculated for 470 neighbourhoods in Outer London. Each neighbourhood was ranked from one to 470, with 1 being the most amenities and 470 being the least amenities.

**Methodology**

Using the 2019 Census, this model score ranked the number of amenities by category, with a 1, 10, 15, 16, 18 and 20-minute walk, was calculated for 470 neighbourhoods in Outer London. Each neighbourhood was ranked from one to 470, with 1 being the most amenities and 470 being the least amenities.

**Potential exists for uplift in average house prices in walkable neighbourhoods compared to borough averages**

Neighbourhood	Borough	Amenity ranking* (1 = most amenities)	Potential value uplift**
Croydon	Croydon	2	21%
Plaistow	Newham	19	18%
Wood Green	Haringey	22	20%

\*Ranking out of 470 Outer London neighbourhoods  
\*\*Change relative to borough/ward average in 2019. 20-minute walkable neighbourhoods are ranked according to borough average in 2019. 20-minute walkable neighbourhoods are ranked according to borough average in 2019. 20-minute walkable neighbourhoods are ranked according to borough average in 2019.

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**2041 target**

**Connectivity**

For residents, the connectivity between places (most commonly by tube) across the Capital also remains an important consideration for buyers. House price growth will be driven by well-connected neighbourhoods that also offer quality amenities within a 20-minute walk.

We continue to help landowners and developers optimise their schemes for their exit strategy. Sites with characteristics such as within a regeneration area, within a walkable neighbourhood, close to green open space or well-connected by tube, rail and cycle superhighway, will usually have the greatest potential.

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**Croydon**

**Case study**

1 Small green space	48 Restaurants	1 Large green space	28 Places of worship
1 Play area	15 Cafes	6 Gyms	7 Community centres
4 Bus stops	32 Pubs	3 Secondary schools	18 Banks
	10 Shops	14 Woodlands	1 Post Office
	5 Primary schools	2 Playing fields	3 Further education colleges
	4 Nurseries		
	4 Health centres		
	4 Elderly care		

Minutes' walk 5 10 15 20

All measures of the amenities scores below the walking

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**80% of trips**

to be by cycle, foot or public transport

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